

- Quoting
- Returned Mail
- Processing Time Cancellations/LPR's
 - New Business Submissions
- Billing Changes System Credentials
 - Claim Reporting

ENDORSEMENTS

Policy change requests must be signed by the named insured. We want to protect your E&O!

Q: When does a policy change request need to be signed?

A: When a name is being removed.

Q: Does SMIC have their own policy change request form?

A: Yes! You can locate this on our website at **securitymutual.com**

Endorsements for Artisan Contractors, BOP's, Landlord Policies, Homeowners & Mobile Homeowners can be completed through the FINYS System Policy change requests that need to be signed, can be uploaded in the FINYS System. <u>Training Resources Available! Click Here</u>

- Mortgagees can only be added under the Location Tab in FINYS
- Explanation of changes need to be entered into the Submit Referral Box.
- Documents to add credits must be uploaded in FINYS.

PROCESSING TIME

Please allow 5-7 Business days for processing endorsement requests.

Q: What if the endorsement is urgent?

A: Please call our Endorsement Team when sending the endorsement request.

Q: What if I want to follow up on or update an endorsement request?

A: Please do not send multiple emails for one request or to update the request, call our Endorsement Team.

Q: Can I send multiple policy numbers in one endorsement email request?

A: No

QUOTE REQUEST ON EXISTING POLICIES

Q: Where do I send a quote request on an existing policy?

A: quotes@securitymutual.com

Q: Can I do a quote on an existing Artisan Contractor, BOP, LLP, HO, or MHO Policy in FINYS?

A: Yes, through the amend tab.

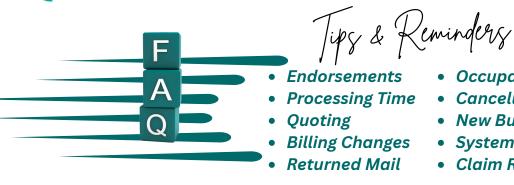
BILLING CHANGE REQUEST FOR ACH/EFT

Q: Where do I send billing change requests?

A: directbill@securitymutual.com

Q: Can I change the pay plan on the policy?

A: No, all pay plan changes need to be sent to directbill@securitymutual.com or endorsements@securitymutual.com



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RETURNED MAIL

Q: What happens when SMIC receives returned mail?

A: No response from Agent within 2 weeks~ legal notice will be sent, and occupancy hazard charge will be applied.

OCCUPANCY

Q: When does SMIC need notification of change in occupancy?

A: Death, Moving, Divorce, Primary or Secondary/Seasonal Change.

CANCELLATIONS /LPR'S

Q: Does SMIC require a fully complete LPR?

A: YES!

- Policy number & name must match.
- Signature must match
 - If signature is not Named Insured, send explanation of who is signing the form, POA/Executor, Additional Insured, etc. PAPERWORK Supporting this must be submitted.
- If mailing address has changed, LPR must reflect this.
- Select a reason for cancellation.
- Provide proof of cancellation when backdating more than 90 days
 - Proof of sale
 - New policy declaration page

NEW BUSINESS SUBMISSION REMINDERS

Q: What lines of business can I quote and electronically submit through FINYS?

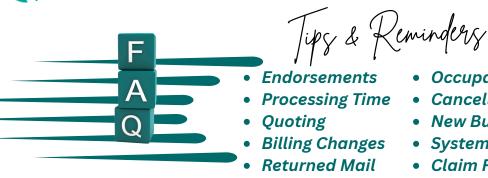
A: Artisan Contractors, BOP, Landlord, Homeowners, Mobile Homeowners

Q: When I am done quoting in FINYS, how do I properly exit out of my quote?

A: Click on the SAVE AND CLOSE TAB.

Q: What if the system indicates I need Underwriting Approval?

A: You will add a task in the Diary book and send to an UW for approval, please don't forget to include yourself. Training Resources Available! Click Here



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SYSTEM CREDENTIALS

Q: What if I do not have access to the main website <u>securitymutual.com</u>?

A: Your Agency administrator will need to establish those credentials for you through Agent Xpress.

Q:Do I need to access the main website first or can I bypass it to get to FINYS?

A: No! All users need to access our main website securitymutual.com

- We house all of our Agent Resources *here* including product information, training aids, articles, Company info and more!
- If you bypass our website to get to FINYS You will <u>not</u> have the most current version!

Q: What if I do not have access to FINYS or need to add or delete a user from FINYS?

A: Your Agency administrator will need to submit an updated & signed FINYS Profile Sheet to password@securitymutual.com.

Q: What if my password for FINYS is not working and needs to be reset?

A: You need to email a FINYS password request to password@securitymutual.com

• Please remember to set your security answers & questions to be able to reset your password yourself for future reset needs.

CLAIM REPORTING

Q: How do I report a loss?

A: For FINYS policies; you can submit the claim through the FINYS system or send a Claim Acord to claims@securitymutual.com.

A: For Agent Xpress policies; you can submit a Claim Acord form to claims@securitymutual.com.

COMPANY CONTACTS

Underwriting: <u>Underwriting@securitymutual.com</u> Endorsements: Endorsements@securitymutual.com Cancellations: Cancellations@securitymutual.com

Claims: Claims@securitymutual.com

Direct Bill including No Loss Statements & Pay Plan change requests: directbill@securitymutual.com

Office: 607-257-5000

Does your team need more training? Contact your Territory Manager to schedule an in office or virtual training today!

> THANK YOU, THE SECURITY MUTUAL TEAM! www.securitymutual.com 607-257-5000